T O U R I S M

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

TOURING VACATIONS

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

TOURING VACATIONS

Prepared for:
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and
Industry, Science and Technology Canada

Prepared by:
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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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BACKGROUND

The Ministry of Development, Trade and Tourism in British Columbia is concerned that the province remain competitive in the international tourism market. B.C. has resisted the decline in tourism most successfully during 1989 and 1990, while other Canadian provinces have suffered seriously. The task at hand now is to make B.C. more attractive to the potential international tourist, thereby ensuring that our industry will remain healthy in the years ahead.

This report forms part of the results derived from the 1991 U.S. Product Market Match Study, a project undertaken by Campbell Goodell Consultants to assess the market potential of current and future British Columbia tourism products in key United States centres and to provide a matching between these products and the characteristics of the market segments most interested in these products.

This is one of a series of four reports, each one devoted to one of the major vacation types investigated in the study. These were: the resort vacation, the city trip, the outdoor adventure and the touring vacation.

METHOD

The results reported below are based on a telephone survey conducted by Campbell Goodell Consultants Limited, in conjunction with Gilmore Research Group, in six American cities representing major sources of travellers to British Columbia. Interviews were conducted during the month of February, 1991 in Seattle, Portland, San Francisco, Los Angeles, Dallas and Chicago. A breakdown of the number of interviews per city is as follows:

Seattle	164
Portland	162
San Francisco	160
Los Angeles	160
Dallas	162
Chicago	161
	969

The survey was limited to those respondents, 25 years of age or older, who have travelled outside the United States during the past three years or who plan to do so in the next two years.

A second part of the study was provided by Compusearch Market and Social Research of Vancouver, using their Lifestyle Analysis procedure. This procedure assigns a lifestyle code to each of the respondents. There are 47 different groups in all (although only about six of these appear frequently among American visitors to British Columbia). Members of each group share common characteristics, including travel preferences.

PRODUCT DESCRIPTION

"A touring vacation" was defined for respondents in the survey as follows:

> "A touring vacation by car, bus, RV or train through areas of scenic beauty, cultural or general interest."

A. SIZE OF POTENTIAL MARKET

Estimating the size of the potential market for B.C. touring vacations involves assessing respondents' likelihood of visiting B.C. for this particular type of vacation. In order to do this, rating information was collected using a scale from 1 (not at all interested) to 5 (extremely interested). A conservative approach applied to obtain market potential projections using the five (extremely interested) ratings only. A more optimistic approach would use both the four and five (extremely interested) ratings. We will present both sets of information but will focus our projections on the five ratings.

Touring vacations were selected as the holiday that 27% of our travellers were extremely interested in taking at some future date. It is to be expected that not all of these people, however, have British Columbia in mind, so the potential market has to be reduced accordingly. Of those extremely interested in touring vacations, 56% also say they are extremely interested in B.C. as a vacation destination, yielding a net of 14% of all travellers.

In order to estimate the numerical market potential that exists for touring vacations to B.C., we need to look at the overall percentage of travellers who have travelled outside the U.S., or plan to, and the total population of the area. These figures can be seen in Table I below.

Table I: Market Potential of U.S. International Travellers

	MARKET SIZE					
	Seattle - King Co.	Portland - Multomah Co.	San Fran Bay Area - S.F. Co.	Los Angeles - L.A. Co.	Dallas - Dallas Co.	Chicago - Cook Co.
1990 Population	1,000,702	371,779	3,934,685	5,518,676	1,176,450	4,968,305
Incidence of Internat. Travellers (25+)	28.7	14.4	30.9	15.3	14.7	17.2
Market Size	287,201	53,536	1,215,818	844,357	172,938	854,548

To determine the potential market share for touring vacations within B.C. we then apply the 14% of travellers who said they were extremely interested to the market size for each city given in the previous table. The results of this are shown in Table II.

Table II: Potential U.S. Travellers to B.C. for Touring Vacations

Seattle Area	40,208
Portland Area	7,495
San Francisco Area	170,215
Los Angeles Area	118,210
Dallas Area	24,211
Chicago Area	119,637
Total	479,976

This approach to estimating suggests a total potential market of 480,000 U.S. travellers who would be extremely interested in taking touring vacations to B.C. In terms of the number of people that make up the potential market, San Francisco, the Chicago area and the Los Angeles area constitute the largest groups. We need to consider, however, that these cities have large numbers of travellers because they are densely populated areas.

This is followed by Seattle and Dallas, with 40,000 and 24,000 travellers respectively. The smallest potential market is in the Portland area, accounting for 7,500 travellers interested in touring vacations in B.C.

Note that these are estimates of the total number of travellers. Since they do not take into account the frequency of travel, they will be smaller than the total number of visits, especially for the more proximate cities.

B. MARKET DEMOGRAPHICS

A look at the demographics of the travellers will give us a better idea of what kinds of travellers make up the potential market for touring vacations. The demographics include who makes the major travel decisions in the households, age, gender and city of interview.

Respondents who expressed interest in touring vacations were asked to indicate who made the major travel decisions in their households and the results are shown in Table III. In the table, 4 means the respondents were interested and 5 means they were extremely interested in touring vacations.

Table III: Major Travel Decisions in Household

Q64. Who makes the major travel decisions in your household?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	967	215	262
Male Head of Household	28%	29%	25%
Female Head of Household	30	27	34
Both Together	41	40	40
Someone Else	1	2	2

Travellers who were extremely interested in touring vacations were likely to come from households in which the male and the female heads of household made joint travel decisions, with four out of ten people who were extremely interested stating this.

A third of this sample stated that the female head was ultimately responsible for major travel decisions, while males made these decisions in one-fourth of the households.

Tables IV and V show the age and gender distribution of the respondents who were most interested in touring vacations.

Table IV: Age Distribution of Respondents

	Total Sample	Interested in Touring Vacations: Four	Interested in Touring Vacations: Five
Number of Respondents	969	216	262
Under 25	1%	0%	0%
25 to 34	33	34	25
35 to 44	28	26	28
45 to 54	17	19	18
55 to 64	10	12	12
65 and over	11	9	16

Table V: Gender Distribution of Respondents

	Total Sample	Interested in Touring Vacations: Four	Interested in Touring Vacations: Five
Number of Respondents	969	216	262
Female	55%	54%	63%
Male	45	46	37

Interest in touring vacations was highest in the 25 to 44 age groups, and was roughly proportionate to their share of the total sample.

More females would opt for touring vacations than males, with females making up close to two-thirds of those claiming to be extremely interested in this vacation option.

Table VI shows the number of respondents from each of the six cities who were most interested in touring vacations.

Table VI: City of Interview

	Total Sample	Interested in Touring Vacations: Four	Interested in Touring Vacations: Five
Number of Respondents	969	216	262
Seattle	17%	18%	16%
Portland	17	19	17
San Francisco	16	15	18
Los Angeles	16	18	15
Dallas	17	13	16
Chicago	17	17	18

The percentage of travellers from each of these cities who were extremely interested in touring vacations did not vary greatly. Travellers from Chicago and San Francisco made up the largest percentage of those extremely interested in a touring vacation, accounting for 18% each of this sample.

The next highest percentage of extremely interested travellers came from Portland with 17%. An equal number of travellers (16%) who assigned a five rating to a touring vacation came from Seattle and Dallas, while Los Angeles trailed at 15%.

C. CLUSTER ANALYSIS

As a part of the interview, a street address and/or nine-digit postal code was collected from each respondent. This information was processed by Compusearch Market and Social Research. The result of this work was to identify each of the respondents in the survey with one of 47 possible geodemographic clusters.

The geodemographic clusters produced by the Compusearch analysis are based on aggregated data provided by the U.S. Census. Each small geographic area, roughly comparable to a Canadian postal code area, is characterized in terms of the average income, family composition, housing type and so forth. In fact, some 1600 indicators are used to characterize each area.

Once the area of residence of a respondent is known, he or she is assigned to the cluster into which this area of residence has been classified. This so-called "lifestyle cluster" allows the analyst to infer from the cluster identity a whole range of behaviours which the individual respondent is likely to share with other members of his or her cluster.

Of the forty-seven possible clusters, those respondents who have visited British Columbia or who plan a visit to the province tend to group into just six of them. These six represent over 45 percent of the total sample. Because these are the largest clusters and because they have a history of visiting British Columbia, they represent the most attractive targets for marketing and are treated in some detail in our analysis.

The following paragraphs give the basic descriptions of the six clusters which are the most important descriptors of international travellers living in the six sampled U.S. cities. The detailed demographics and product preferences of each of these groups can be found in the appendix.

Definitions of the Clusters

Affluent Urban Singles (Cluster 7)

Neighbourhoods in which members of this cluster live tend to be populated by upscale professionals. Often residents of high-priced urban and suburban apartments and condos, these high income singles lead an active lifestyle characterized by sporting activities, travel and an avid appetite for entertainment events of all kinds. Affluent Urban Singles tend to be aware of the newest trends and technologies, and indulge their taste for the new and different in areas as diverse as home entertainment systems and personal exercise equipment. Their purchase preferences lean toward high quality merchandise of all kinds, particularly home technology products. Financially, they tend to be greater risk-takers than some of their older cluster counterparts and concentrate more on investments with higher risk and bigger payoff.

This cluster represents 2.9 percent of the adult population of the United States and 13.5 percent of the present sample.

Young Professionals (Cluster 10)

Members of this cluster tend to live in neighbourhoods characterized by the presence of young, average income, single professionals. The members of this cluster share many characteristics with their more upscale High Rent Single Professional counterparts, including multi-unit dwellings and active lifestyles. Unlike the latter, however, Well-Educated Young Single Professionals tend to be younger and less asset rich. Extremely fitness and health conscious, their interests include sporting goods, gourmet and health foods and exercise equipment. While their income is still growing, these individuals indulge their taste for luxury with credit products including personal loans and credit cards. They are, however, beginning to accumulate assets in long-term deposit instruments and are likely, when able, to invest in brokerage accounts.

This cluster comprises 1.4 percent of the U.S. adult population and 6.5 percent of the sample.

Highly Mobile Working Couples (Cluster 12)

These above-average income, white collar workers are likely to live in two income families. Their primary focus is on their homes - expenditures on home furnishings and technologies are significantly higher than the national average. That is not to imply, however, that Young Mobile Working Couples with Children are homebodies. These young families are also active in a number of sports activities including golf, tennis, racquetball and skiing.

This cluster accounts for 3.8 percent of the U.S. adult population and 6.3 percent of the present sample

Young Urban Educated Singles (Cluster 17)

Characterized as young, well educated and single, residents of these clusters lead the active single life. Although they may earn only average incomes, their education and professional experience combine to predict an upwardly mobile lifestyle. These individuals tend to reside in high rent apartments, and enjoy an upscale lifestyle. Well-Educated Young Mobile Single Apartment-Dwellers are avid participants in sports ranging from bicycling to racquetball, but their activities are not confined to the sports arena. They also enjoy live theatre, concerts, movies, and restaurant dining on a frequent basis. In addition, they appreciate the quality in articles as diverse as fashionable clothing and imported wines.

This cluster makes up 2.2 percent of the adult American population and 7.0 percent of the sample.

Young Urban Ethnics (Cluster 24)

An urban based cluster, this group contains households living in multi-family dwelling units, typically earning low incomes. Characterized by singles, Young Urban Ethnic Low Income Mobile Single households are likely to be headed by either females or members of various ethnic groups. The ethnic nature of this segment translates into a strong demand for gourmet and imported food items and beverages. This feature makes Young Urban Ethnic Low Income Mobile Single areas excellent target markets for products and services which have an ethnic appeal, as well as travel related services associated with their ethnic origins. In addition, these individuals are good markets for sporting activities, demonstrating a propensity for skiing, camping, jogging and attendance at professional sporting events.

Members of this cluster make up 2.6 percent of the U.S. adult population and 7.9 percent of the sample.

Young Mobile Apartment Dwellers (Cluster 25)

The urban areas in which members of this cluster live represent a younger, active segment - similar to Young Urban Ethnics without the ethnic flavour. Apartments, below average income and blue collar occupations typify these city-based households. Product preferences associated with this group include soft drinks, domestic beer and snack candy, as well as activities such as camping, skiing and fishing. Households living in Cluster 25 areas are also more likely than average to be headed by females.

In the U.S. adult population, 2.6 percent of adults belong to this cluster, as compared to 4.4 percent of the sample.

These cluster descriptions contain information that might have been anticipated. For example, we find that a large proportion of international travellers are young, often living in rented housing. Both characteristics correlate with high levels of mobility and, naturally enough, a high incidence of international travel.

Other patterns might not have been guessed. There is a high proportion of ethnics in the sample, especially Hispanics. This is doubtlessly due to the fact that many Hispanic residents of Los Angeles and Dallas travel to Mexico to visit relatives on a relatively regular basis. While level of interest in travel to Canada is relatively high, so is the level of disinterest, suggesting that this will probably be a difficult cluster to attract.

Finally, perhaps the most surprising characteristic of the six clusters described above is that they are not high income earners. Only two of the clusters are above average in income and only one can be described as "up-scale." One reason this occurs is of course because there are more middle income people in the population, even of the population of international travellers, than there are high income people. These data also suggest that people who visit British Columbia may be less affluent than those who travel to other international destinations.

We would be remiss not to point out, however, that in spite of their small numbers, members of the up-scale clusters in the sample do travel internationally with disproportionate frequency. The following lists the most affluent clusters, all of which are higher on the socio-economic scale than the top cluster described above. In addition, we provide the proportion each cluster comprises of the U.S. population and of the sample, as well as an index of over-representation (the quotient of the two previous figures).

Cluster	% of U.S.	% of Sample	Index
Top income, highly educated professionals in prestige homes	1.5	3.1	209
Well-educated mobile professionals in new homes and condos	1.2	1.8	148
Younger mobile professionals, home-owners with children	2.2	3.4	157
Mature Professionals with larger families (teenagers)	1.7	2.4	141
Non-mobile professionals in established communities	2.7	4.9	182
Younger mobile large families with children in new homes	3.1	3.2	104

We can see that all of these clusters are more likely than average to be international travellers. While they represent just over 12 percent of the adult population of the U.S., they comprise nearly 19 percent of international travellers in our sample. Some of this over-representation arises from the fact that our sample is restricted to urban areas where these clusters tend to live. Nevertheless, individuals in these groups should also receive marketing attention, particularly since they do not report much travel to British Columbia. This is especially true of any segment of the provincial tourism industry which is targeted toward up-scale travellers, such as wilderness resorts.

Importance for Touring Vacations

The clusters with the highest level of interest in touring vacations are:

Cluster 12 (Highly Mobile Working Couples) 30% of whom expressed interest in touring vacations. This group comes predominantly from Seattle and Portland, have a preference for driving and would be willing to travel an average of 16 hours to get to their destinations. Nearly half of this group has visited B.C. and more of them know a moderate amount about B.C. than any of the other groups.

Cluster 10 (Young Professionals) with 29% showing interest in touring vacations. This group also consists primarily of Seattle and Portland residents. They indicate that they would be willing to spend much less on touring vacations than any of the other groups. Many of these people have not travelled to B.C. and do not know much about the Province.

With 25% expressing interest are both Cluster 25 (Young Mobile Apartment Dwellers), many of whom live in Seattle or Portland and are fairly knowledgeable about B.C., and Cluster 24 (Young Urban Ethnics), who tend to be from San Francisco and Los Angeles and who know the least about B.C. of any group.

D. TRAVEL EXPERIENCE AND INTERESTS

An examination of respondents' travel experiences and their future plans will assist in determining the preferences of the travellers and the size of the potential market for B.C. The number of people who indicate a willingness to travel to B.C. in the near future constitute the most significant part of the potential market for touring vacations.

In order to get an idea of the past history of these travellers, respondents were asked about their travel destinations in the last 3 years, which is shown in Table VII. We note, however, that respondents gave more than one response for this question.

Table VII: Vacation Destinations of the Last 3 Years

Q3. Thinking of your major vacation travel to any of location, what vacation destinations have you travelled to in the last three years?

	Total Sample	Interested in Touring Vacations	
		Four	Five
Total Number	969	216	262
Europe	33%	33%	34%
Mexico/Central/ South America	30	27	27
Other U.S. States	20	19	21
Other	19	15	20
California	14	15	17
Caribbean	13	8	13
Asia	12	14	9
Vancouver	**11**	**13**	**11**
Hawaii	11	9	10
Pacific Northwest	6	8	6
Australia/New Zealand/ South Pacific	6	7	5
Other Canada	6	6	7
Victoria	**5**	**7**	**5**
Ontario	4	5	5
Other B.C.	**4**	**6**	**3**
None	4	4	5
Alaska	3	4	2
Alberta	1	3	1

The major vacation destination that travellers in this category had travelled to in the last three years was Europe. Mexico, Central America and South America was second with other U.S. states coming in as the third most popular vacation destination. The place that

had been selected for a vacation by the fewest travellers was Alberta.

When looking at B.C. as a vacation destination, we see that 11% of the travellers who were extremely interested in touring vacations had been to Vancouver in the last three years. Victoria came in fourteenth in the list of locations that were mentioned by these travellers, with 5% of those who were extremely interested in this option having visited it recently.

Other places in B.C. had been a destination for 4% of the travellers in total and 3% of the travellers in the extremely interested group. If we narrow down the multiple responses to get a percentage of travellers who mention a B.C. destination at least once, we have a net of 14% of the travellers.

In the next table, we look at what destinations these respondents intend to visit in the next 2 years. We note that some travellers gave more than one response.

Table VIII: Vacation Destinations in the Next 2 Years

Q4. And what destinations do you have firm plans to visit during the next two years?

		Interested in Touring Vacations	
	Total Sample	Four	Five
	969	216	262
None	27%	25%	24%
Europe	21	18	25
Mexico/Central/ South America	16	15	19
Other U.S. States	13	13	14
Other	19	14	14
Caribbean	7	10	4
Asia	7	8	5
Hawaii	6	5	8
Australia/New Zealand/ South Pacific	6	7	7
Vancouver	**5**	**7**	**5**
California	5	3	7
Pacific Northwest	4	4	4
Other Canada	3	3	3
Ontario	2	2	2
Other B.C.	**2**	**2**	**4**
Alaska	2	4	2
Victoria	**1**	**4**	**2**
Alberta	1	2	1

Europe was again the main destination for most travellers who were extremely interested in touring vacations in the next two years. This was followed by Mexico, Central and South America, which was the choice for 19% Other U.S. states were also a popular choice for 14% of these travellers.

In terms of potential market for B.C., Vancouver was a choice for 5% of the travellers extremely interested in touring vacations. Other B.C. destinations and Victoria would only be visited by about 6% of the respondents. The net number of people who said they will take at least one vacation within B.C. in the next two years is 8%.

The next question deals with the respondents' knowledge of B.C. as a vacation destination.

Table IX: Knowledge of B.C. as a Vacation Destination

Q44. How much do you know about B.C. as a vacation destination?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	961	214	259
A great deal	11%	11%	12%
A moderate amount	32	36	31
A little	34	36	31
Nothing at all	23	17	25

Four out of ten of the travellers who were extremely interested in touring vacations knew a great deal or a moderate amount about B.C. as a vacation destination. A third of the travellers in this category knew a little about B.C. One out of four of the respondents knew nothing at all about B.C. as a vacation destination.

The number of travellers who have taken a vacation in B.C. is shown in the next table.

Table X: Number of Travellers Who Have Taken A Vacation In B.C.

Q45. How many times, if any, have you taken any kind of vacation in B.C. for one night or longer?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	957	213	258
Vacationed in B.C. one night or longer	51%	58%	49%
None	49	42	51
Mean number of trips	3.3	2.8	3.1

Half of the travellers who were extremely interested in touring vacations have been to B.C. for a vacation at least one night or longer, and half have not.

Most of those travellers who have visited B.C. have done so an average of 3 times.

The level of interest in a B.C. vacation displayed by these travellers is a key indicator of B.C.'s likelihood of gaining a larger share of touring vacationers.

Table XI: Interest in A Vacation in B.C.

Q46. How interested are you in taking a vacation of any kind, lasting one night or longer, in British Columbia?

	Total Sample	Interested in Touring Vacations	
		Four	Five
Number of Respondents	937	211	249
Not at all interested	10%	8%	7%
2	7	4	5
3	21	21	15
4	23	33	17
Extremely Interested	39	35	56

More than half the travellers who were extremely interested in touring vacations stated that they were also extremely interested in visiting B.C. on a holiday. Significantly more travellers interested in touring vacations showed interest in visiting B.C. than the average of all travellers in the sample.

Only a small percentage (7%) of the respondents in the same category were not at all interested in B.C. as a destination.

E. SPECIFIC PRODUCT PREFERENCES

The travellers who were interested in this vacation were asked for their preferences on several specifics while on touring vacations. This section summarizes that information.

The first question in this section was asked to determine the amount of money respondents interested in touring vacations were willing to spend on such a vacation. Table XII gives us this information.

Table XII: Average Cost Per Day For A Touring Vacation

Q10b. How much per day would you be willing to pay for a touring vacation?

	Number of Respondents	Mean Amount Per Day
Total Sample	168	$104
Seattle/ Portland	58	$ 80
San Francisco/ Los Angeles	48	$120
Dallas/ Chicago	62	$114

Respondents from San Francisco and Los Angeles were willing to spend more per day than any of the other groups, on average, for a touring vacation. On the other hand, people in the Seattle and Portland area were willing to spend less than average on this type of vacation.

On average, respondents indicated that they would be willing to travel 15 hours to get to their vacation destinations. Interestingly, it was the respondents from Portland and San Francisco who stated they would be willing to travel the greatest length of time. The respondents from the other cities would travel a shorter time to get to their vacation destinations.

Table XIII: Maximum Number of Hours Willing To Travel

	Interested in Touring Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	209	29	33	40	34	38	35
Mean number of hours	15	11	18	17	13	14	16

Table XIV: Travel by Air or Car

	Interested in Touring Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	200	23	32	40	34	38	33
Air	74	78	63	90	77	55	82
Car	23	22	34	10	18	37	18
Other	3	00	3	0	5	8	0

On touring vacations, the majority of the travellers from each of the cities would travel to their destinations by air. Travellers from San Francisco and Chicago overwhelmingly favour this mode of travel.

A third of the travellers from Portland and Dallas would drive to their destinations.

If this was their major vacation for the year, respondents stated that they would stay away from home an average of 15 nights. People in Portland and San Francisco would be willing to stay away the longest, while travellers from Seattle and Los Angeles indicated that on average, they would return home sooner. These results are presented in the next table.

Table XV: Average Number of Nights Away from Home

	Interested in Touring Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	209	29	33	40	34	38	35
Mean number of nights	15	11	18	17	13	14	16

The majority of respondents stated a preference for middle-range accommodations, which was particularly true in Seattle and Portland. Four out of ten travellers from San Francisco indicated that these accommodations would be sufficient for a touring vacation. We see these results in the next table.

Table XVI: Degree of Luxury Wanted for this Vacation

	Interested in Touring Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	256	44	40	34	42	49	47
The most luxurious	6%	7%	5%	4%	11%	6%	2%
First Class	14	5	13	21	17	14	18
Middle Range	55	67	61	39	49	50	58
Basic Accommodation	21	14	18	32	23	22	20
Other/Depends	4	7	3	4	0	8	2

For respondents who were going on touring vacations, the average size of the travelling party was three people.

Next, respondents were asked to rate their levels of interest in activities that might be part of their touring vacations.

Table XVII: Interest in Guided or Organized Tours

Q28. How interested would you be in the following activities that you might do on a touring vacation: Guided or Organized Tours

		Interest in Guided or Organized Tours	
	Total Sample	Four	Five
Number of Respondents	969	38	37
Seattle	17%	16%	8%
Portland	17	24	22
San Francisco	16	5	11
Los Angeles	16	24	14
Dallas	17	18	11
Chicago	17	13	35

We can see that the highest percentage of the people who indicated they were extremely interested in guided tours came from Chicago, accounting for a third of this sample.

Travellers from Portland made up the next biggest group of people, with two out of ten people showing an interest.

Interest in guided tours was substantially lower in Los Angeles, San Francisco and Dallas, while Seattle trailed with only 8% interested.

Females interviewed showed a greater preference for guided tours than males.

Table XVIII: Interest in Tours in Cities

Q29. How interested would you be in the following activities that you might do on a touring vacation: Tours in Cities

		Interest in Tours in Cities	
	Total Sample	Four	Five
Number of Respondents	969	48	25
Seattle	17%	19%	12%
Portland	17	13	28
San Francisco	16	8	24
Los Angeles	16	19	16
Dallas	17	21	0
Chicago	17	21	20

For this activity, we need to keep in mind that only a small number of travellers indicated that they would be extremely interested in going on city tours. However, out of the travellers who were extremely interested in this activity, the largest percentage were from Portland, with nearly three out of ten people saying they were extremely interested.

Travellers from San Francisco and Chicago made up the next largest group of people who were extremely interested in this vacation, followed by Los Angeles and Seattle, with 16% and 12% (respectively) of the sample. It is interesting to note that none of the travellers in the Dallas sample showed a high level of interest in city tours.

Table XIX: Interest in Tours in Rural Areas

Q30. How interested would you be in the following activities that you might do on a touring vacation: Tours in Rural Areas

		Interest in Tours in Rural Areas	
	Total Sample	Four	Five
Number of Respondents	969	48	28
Seattle	17%	15%	21%
Portland	17	15	18
San Francisco	16	13	18
Los Angeles	16	19	11
Dallas	17	25	11
Chicago	17	15	21

The largest number of travellers who were extremely interested in rural tours were from Seattle and Chicago, each making up 21% of the sample.

Travellers from Portland and San Francisco made up the next largest groups of people who were extremely interested in rural tours. The smallest percentage of people who were extremely interested in this activity were from Los Angeles and Dallas, which each accounted for 11% of this sample.

Among the travellers interviewed on this activity, more of the younger travellers showed a preference for this activity than the older travellers.

Table XX: Interest in Sports Tours

Q31. How interested would you be in the following activities that you might do on a touring vacation: Sports Tour

		Interest in Sports Tour	
	Total Sample	Four	Five
Number of Respondents	969	19	24
Seattle	17%	32%	8%
Portland	17	5	29
San Francisco	16	5	0
Los Angeles	16	21	4
Dallas	17	21	13
Chicago	17	16	46

The largest percentage of travellers who were extremely interested in sports tours were from Chicago, accounting for 46% of that category. This was substantially more interest than the average traveller from Chicago has indicated for other activities.

Travellers from Portland were the second largest group of travellers extremely interested in sports tours, with three out of ten travellers expressing extreme interest in this.

Next in order of size was Dallas, followed by Seattle. Travellers from Los Angeles who said they were extremely interested in this activity accounted for only 4% of the sample. No one in our sample from San Francisco was extremely interested in sports tours.

People in the older age groups were less likely to take touring vacations that involve sports. Three-quarters of the travellers over 65 stated they would not go on such a holiday, while less than half of the people between the ages of 25 to 34 felt the same way.

Table XXI: Interest in Outdoor Activities

Q32. How interested would you be in the following activities that you might do on a touring vacation: Outdoor Activities

	Total Sample	Interest in Outdoor Activities	
		Four	Five
Number of Respondents	969	45	45
Seattle	17%	16%	22%
Portland	17	16	16
San Francisco	16	13	13
Los Angeles	16	22	9
Dallas	17	13	13
Chicago	17	20	27

After city tours, outdoor activities had the second largest number of travellers who stated they were extremely interested. Over one-fourth of the travellers who were extremely interested in outdoor activities were from Chicago. Together with Seattle, which had 22% of the sample, it accounted for half of the travellers who were extremely interested in these activities.

The next largest group of extremely interested travellers came from Portland, with 16% of the sample followed by San Francisco and Dallas, each with 13%. Los Angeles, accounting for only 9% of the extremely interested category, was the smallest group.

Outdoor activities also seem to be more popular with the younger travellers, while fewer of the older travellers were enthusiastic about this activity.

In the next table we see the average level of interest expressed by the respondents for each of the activities discussed.

Table XXII: Mean Levels of Interest in Specific Activities

	Interested in Touring Vacations
	Total Sample
	226
Tours in Cities	3.0
Tours in Rural Areas	3.0
Outdoor Activities	3.0
Guided or Organized Tours	2.7
Sports Tours	2.2

Among the activities presented to our respondents, we see that city and rural tours plus outdoor activities were equally popular, with average (or mean) scores of 3.0 out of 5.0.

Guided or organized tours was the next most popular activity with a mean of 2.7. The least popular activity was sports tours, which only received a mean of 2.2.

Respondents were then asked if there were any other activities they would like to partake in while on touring vacations. The results are shown in Table XXIII.

Table XXIII: Other Vacation Activities of Interest

Q27. Is there any other type of vacation activity in particular that would interest you more than any of the ones that I have just mentioned?

	Interested in Touring Vacations						
	Total Sample	Seattle	Portld.	S.F.	L.A.	Dallas	Chic.
Number of Respond.	123	25	22	19	19	15	23
Museums/ Gall Cult.	9%	4%	13%	22%	5%	7%	4%
Visiting Fam./Friend	3	4	5	0	5	7	0
Shopping	2	0	0	0	11	0	4
Music/ Entertain.	4	0	9	11	5	0	0
Touring/ Sightseeing/ Exploring	12	0	13	21	21	13	9
Dining	1	0	0	0	0	7	0
Family/Kids Activities	2	4	0	0	0	7	0
Gambling	1	0	5	0	0	0	0
Meet people/Lrn Their Cult.	2	4	0	0	5	7	0
Religious Activities	2	0	0	5	0	7	0
Beaches	3	4	0	0	0	12	4
Cruises	8	20	9	0	5	12	0
Sailing	4	8	0	5	0	7	4
Swimming/ Snorkling/ Scuba Diving	9	16	5	5	11	7	9

Other Water Sports	2	0	0	0	0	7	9
Camping	1	0	0	5	0	0	0
Fishing	1	0	5	0	0	0	0
Skiing/Cross Country	1	0	0	0	5	0	0
Other Sports	2	0	5	0	0	0	4
Hist./Arch. Sites	12	8	17	5	16	0	22
Relax/ rest	6	8	5	5	0	0	13
Other	13	20	9	16	11	0	18

Before examining the results of this table, we need to keep in mind that the number of travellers who responded to this question was very small and therefore the findings need to be looked at in that perspective.

The most frequently mentioned other vacation activity by travellers who responded to this question were visiting historical sites and touring/sightseeing.

Visiting museums and galleries was another activity mentioned.

F. MEDIA FACTORS

The effectiveness of present advertising strategies was explored through a series of questions about awareness of B.C. The tourism advertising for Canada as a whole was used as a comparison. Questions were asked of travellers to help determine the advertising media that would be the most helpful in getting the message across to them.

Travellers who were interested in touring vacations were asked if they had heard the slogan ("Super, Natural") associated with a vacation destination, and these results are presented in Table XXIV.

Table XXIV: "Super, Natural" Associated with a Vacation Destination

Q43a Have you ever heard the slogan "Super, Natural" associated with a vacation destination?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	951	206	258
Yes	12%	13%	15%
Yes, If mentioned B.C.	8	6	6
No	80	81	80

The slogan "Super, Natural" was unfamiliar to eight out of ten people surveyed. This slogan was known to only two in ten people who were extremely interested in touring vacations, and few of them were able to associate this slogan with B.C. without any prompting.

Respondents who had not associated the slogan with B.C. were asked the next question.

Table XXV: "Super, Natural" Associated with B.C.

Q43b. Have you heard the slogan ("Super, Natural") associated with British Columbia?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	923	197	258
Yes	18%	21%	20%
No	74	72	74
Other	1	1	0
Yes, If mentioned	7	7	6

Presenting the respondents with both the name (British Columbia) and the slogan ("Super, Natural") increased the number of people who recalled the slogan in association with B.C. Twenty percent of the travellers in the extremely interested category now remembered the slogan, in addition to the 6% who remembered it with reference to B.C. without prompting.

However, three quarters of the travellers still had never heard of this slogan associated with B.C.

The advertising promoting Canada as a vacation destination was more effective as eight out of ten travellers in the highest rating category had heard or seen these promotions. Table XXVI below shows the breakdown of the figures.

Table XXVI: Advertising for Canada as a Vacation Destination

Q51. Have you seen or heard any advertising for Canada as a vacation destination during the past year?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	948	209	257
Yes	81%	83%	83%
No	19	17	17

It may be of interest to note that fewer of people had heard or seen advertising for B.C. as a vacation destination during the past year, in comparison to the number who had heard it for Canada.

Table XXVII: Advertising for B.C. as a Vacation Destination

Q52. Have you seen or heard any advertising for B.C. as a destination during the past year?

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	922	204	246
Yes	62%	67%	65%
No	38	33	35

Two-thirds of the travellers who expressed extreme interest in touring vacations had seen or heard some advertising promoting B.C. as a vacation destination in the last year. So although 74% of these travellers had previously said that they had no knowledge of the slogan "Super, Natural", a substantial number of them believe they had been exposed to the advertising.

The next series of questions all dealt with different means of getting information across to the travellers. The ratings are based on a 5 point scale, with 1 being not at all useful and 5 being extremely useful.

Table XXVIII: Brochures as a Source of Information

Q58. How useful do you find the following as a source of information when you are planning a vacation?: Brochures

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of	964	216	260
Not at all useful	8%	8%	5%
2	11	7	9
3	27	33	22
4	28	28	30
Extremely Useful	26	24	34

Brochures were a useful source of information to two-thirds of the travellers who rated a touring vacation very highly, which is higher than average for all travellers. Approximately 14% of these travellers stated they had little or no use for brochures.

Table XXIX: Usefulness of Radio and Television Advertising

Q59. How useful do you find the following as a source of information when you are planning a vacation?: Radio and television advertising.

		Interested in Touring Vacations	
	Total Sample	Four	Five
Number of Respondents	964	215	259
Not at all useful	27%	25%	31%
2	27	34	16
3	27	27	27
4	11	12	12
Extremely Useful	8	2	14

Radio and television advertising seems to be a less effective advertising tool than brochures. Nearly half of the travellers in the extremely interested category felt that this was not a useful method of getting the information across, while one out of four people found it to be useful.

Respondents who were extremely interested in touring vacations felt that newspaper and magazine articles were useful in planning their vacations. This method of advertising was more favourably received than radio and television advertising.

Table XXX: Usefulness of Newspaper and Magazine Articles

Q60. How useful do you find the following as a source of information when you are planning a vacation?: Newspaper and magazine articles and advertising.

	Total Sample	Interested in Touring Vacations: Four	Interested in Touring Vacations: Five
Number of Respondents	962	214	260
Not at all useful	8%	7%	12%
2	11	14	7
3	28	30	24
4	29	32	24
Extremely Useful	24	17	33

Travel agents or tour operators are another good source of information on touring vacations. A third of the people who were interested in touring vacations found travel agents to be useful to some extent.

Table XXXI: Usefulness of Travel Agents or Tour Operators

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Travel agents or tour operators.

	Total Sample	Interested in Touring Vacations: Four	Interested in Touring Vacations: Five
Number of Respondents	962	214	260
Not at all useful	15%	12%	15%
2	13	12	14
3	23	27	18
4	24	30	20
Extremely Useful	25	19	33

Table XXXII: Usefulness of Friends and Relatives

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Friends or relatives.

	Total Sample	Interested in Touring Vacations	
		Four	Five
Number of Respondents	964	216	261
Not at all useful	10%	8%	11%
2	8	8	8
3	19	20	17
4	27	32	21
Extremely Useful	36	32	43

Friends and relatives appear to be one of the most useful sources of information when planning touring vacations. This was a useful source of information to 64% of the respondents in the extremely interested rating, while only 19% found this source of little use.

The overall means for each medium as a useful source of information to people who are extremely interested in touring vacations is presented in the table below.

Table XXXIII: Means For Each Medium as a Useful Source of Information

	Interested in Touring Vacations
	Total Sample
Number of Respondents	262
Brochures	3.8
Friends & Relatives	3.8
Newspapers & Magazines	3.6
Travel Agents & Tour Operators	3.4
Radio & Television	2.6

Travellers who were extremely interested in touring vacations found that brochures and the information they received from friends and relatives to be the most helpful, each with a mean of 3.8 out of 5.0.

These were closely followed by newspapers and magazine articles in third place with a mean of 3.6. The information received from travel agents and tour operators came in fourth with a rating of 3.4.

The least useful source of information to travellers extremely interested in touring vacations was advertising seen or heard on radio and television, which only received a rating of 2.6.

G. MARKETING IMPLICATIONS

The estimated market size for touring vacations in B.C. is some 480,000 families over an unknown period of time. Among the six U.S. metropolitan areas surveyed, San Francisco contributes the largest number to this market, followed by Chicago and Los Angeles. Travellers from San Francisco and Los Angeles say they are willing to pay more for such a vacation than are travellers from the other cities.

The target market for B.C. touring vacations is more female than male. All ages over 25 are interested, but travellers over age 65 seem to have stronger interest than others. Half of the travellers interested in touring vacations have been to B.C. and they average 3 trips apiece. From the cluster analysis, touring vacations have the most appeal to Highly Mobile Working Couples and Young Professionals, many of whom live in Seattle and Portland and many of whom are willing to spend less than the average on their vacations.

Product preferences are quite diverse. City tours, rural tours and outdoor activities all received high expressions of interest. Guided/organized tours and sport tours were of somewhat less interest. The expected length of touring vacations, on average, was about 15 nights and most people would travel to B.C. by air.

Communications media that appeal to these travellers tend to be the informal types: word-of-mouth and brochures. Next, they rate articles in newspapers and magazines, as well as the recommendations of their travel agents. Radio and TV were rated lower, which is frequently seen in survey research and should be interpreted with some discretion.

The communications strategy that is suggested by these survey results is one of building awareness for the province and its attractiveness for touring vacations. We note, for example, that one-fourth of the travellers who are extremely interested in touring vacations say they know "nothing at all" about B.C. Eight out of ten cannot associate "Super, Natural" with B.C. These results point to the need for a substantial increase in awareness, both of the province and its advantages for touring vacations, as well as for the advertising being used.

APPENDIX

CLUS. ER 7

Affluent Urban Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	37.6	19.9	189
White Collar	74.7	53.4	140
Blue Collar	15.2	30.9	49
Unskilled	2.1	5.0	42
HOUSEHOLD COMPOSITION			
Female Householder	33.9	24.3	140
Black Householder	7.4	10.5	70
Spanish Householder	4.6	4.7	98
Asian Householder	4.0	1.0	400
Householder Age 65+	17.1	21.4	80
Married Couples	41.1	58.5	70
Households w/ Children	22.4	41.0	55
Two Workers	57.7	52.8	109
SESI	77	48	160
INCOME			
Income 0 to 25K	13.9	39.4	35
Income 25K+ to 50K	68.4	45.0	152
Income 50K+ to 75K	15.3	12.5	122
Income 75K+	2.4	3.1	77
Median HH Income	$29,715	$24,533	122
HOUSING			
Single Family Homes	44.6	81.2	55
Multi-Family Homes	55.4	18.8	295

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	28.5	35.0	81
Some College	20.8	14.6	142
College Graduate	33.0	14.1	234
Median # Years Comp.	13.8	12.2	113
AGE DISTRIBUTION			
Age 0-5 Years	2.9	4.1	71
Age 0-17 Years	8.9	15.5	57
Age 18-34 Years	20.9	27.4	76
Age 35-54 Years	9.2	13.0	71
Age 55-64 Years	6.4	8.8	73
Age 65+ Years	8.0	11.2	71
Median Age in Years	39.6	40.0	99
LENGTH OF RESIDENCE (In Years)	5.3	8.0	66

1988 U.S. HOUSING POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,970,383	90,328,747	3.3
Adult Population	5,232,446	181,649,997	2.9

CLUSTER 7

PRODUCT PREFERENCES

FINANCIAL SERVICES

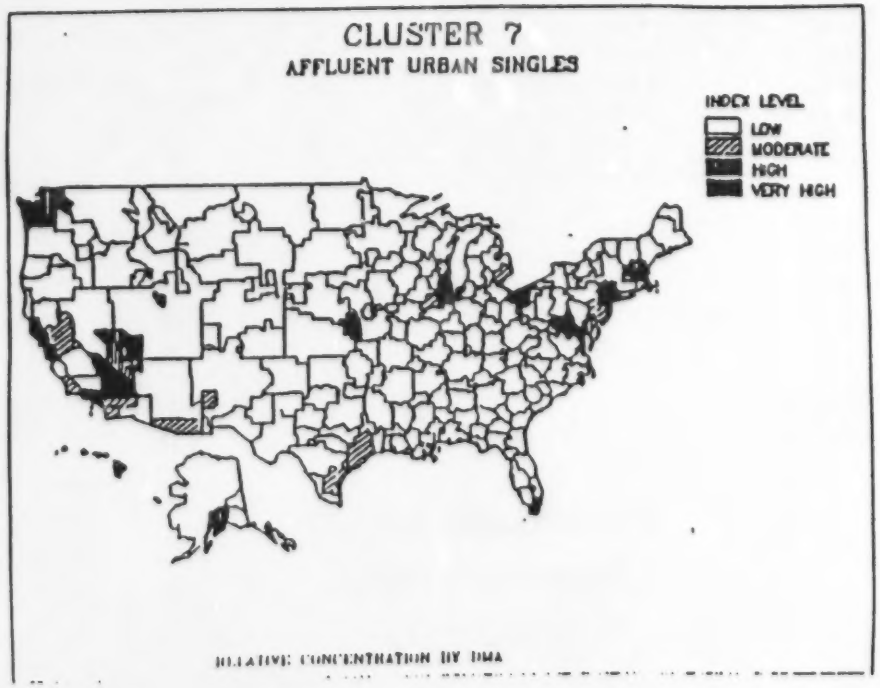
American Express Gold Card
Investment Property
Travel/Entertainment Cards
Brokerage Accounts
Insured Money Market Accounts
Temporary Insurance
Mutual Fund
Common Stock
IRA
Interest Bearing Checking Accounts

LEISURE PURSUITS

Domestic Travel
Snow Skiing
Attend Horse Races
Foreign Travel
Photography
Golf
Camping
Live Theatre/Concerts
Attend Pro Sports Events
Frequently Attend Movies

SPENDING HABITS

Gourmet Ice Cream
Discount Airlines
Imported Beers
Imported Whiskey
Frozen Yogurt
Lowfat Milk
Diet Soft Drinks
Imported Cars
Bottled Water
Imported White Wines



CLUSTER 10

Young Professionals

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	36.8	19.9	185
White Collar	69.2	53.4	130
Blue Collar	17.6	30.9	57
Unskilled	2.4	5.0	48
HOUSEHOLD COMPOSITION			
Female Householder	30.9	24.3	127
Black Householder	4.5	10.5	43
Spanish Householder	2.9	4.7	62
Asian Householder	1.9	1.0	190
Householder Age 65+	17.5	21.4	82
Married Couples	46.4	58.5	79
Households w/ Children	27.0	41.0	66
Two Workers	59.9	52.8	113
SESI	72	48	150
INCOME			
Income 0 to 25K	22.3	39.4	57
Income 25 to 50K	64.7	45.0	144
Income 50 to 75K	11.6	12.5	93
Income 75K+	1.4	3.1	45
Median HH Income	$26,950	$24,533	110
HOUSING			
Single Family Homes	70.7	81.2	87
Multi-Family Homes	29.3	18.8	156

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	24.8	35.0	71
Some College	21.9	14.6	150
College Graduate	36.6	14.1	260
Median # Years Comp.	14.1	12.2	116
AGE DISTRIBUTION			
Age 0-5 Years	3.7	4.1	90
Age 0-17 Years	11.5	15.5	74
Age 18-34 Years	25.3	27.4	92
Age 35-54 Years	12.0	13.0	92
Age 55-64 Years	6.7	8.8	76
Age 65+ Years	9.2	11.2	82
Median Age in Years	35.5	40.0	89
LENGTH OF RESIDENCE (in Years)	4.9	8.0	61

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	1,375,287	90,328,747	1.5
Adult Population	2,590,603	181,649,997	1.4

CLUSTER 10

PRODUCT PREFERENCES

FINANCIAL SERVICES

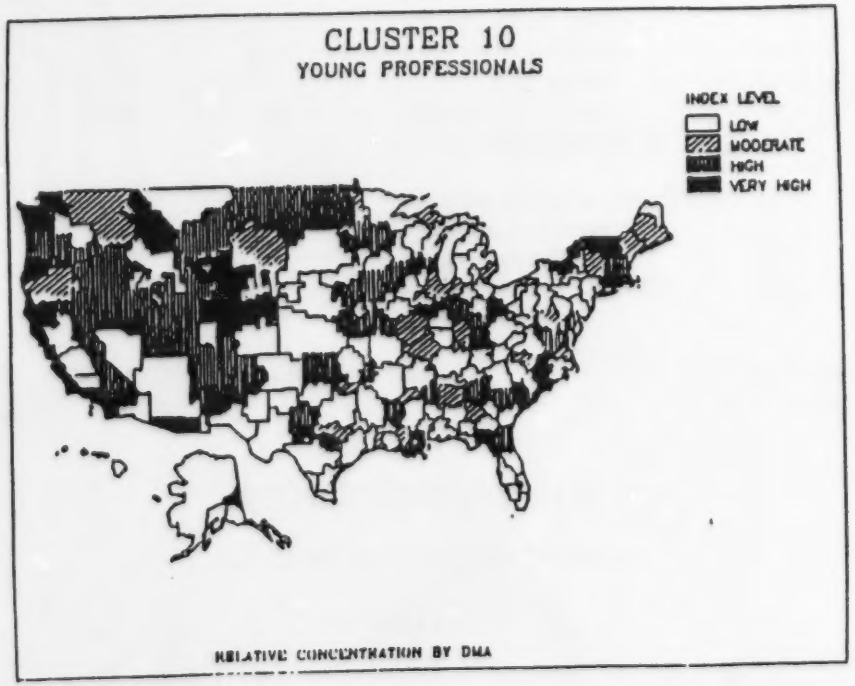
Mutual Funds
Second Mortgage/Home Equity Loans
Auto Loan - New Car
American Express Gold Card
Insured Money Market Account
Prepaid Health Program
Temporary Insurance
Home Improvement Loans
Long Term Savings Certificate
Accounting Services

LEISURE PURSUITS

Snow Skiing
Camping
Jogging
Golf
Live Theatre/Concerts
Bicycling
Domestic Travel
Public Issue Involvement
Frequently Attend Movies
Tennis

SPENDING HABITS

Imported Beers
Gourmet Foods
Diet Soft Drinks
Frozen Yogurts
Upscale Cosmetics
Paperback Books
Jewelry
Imported Cars
Bottled Water
Domestic White Wine



CLUSTER 12

Highly Mobile Working Couples

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	26.3	19.9	132
White Collar	63.2	53.4	118
Blue Collar	24.2	30.9	78
Unskilled	3.2	5.0	64
HOUSEHOLD COMPOSITION			
Female Householder	17.7	24.3	73
Black Householder	5.0	10.5	47
Spanish Householder	4.0	4.7	85
Asian Householder	2.0	1.0	200
Householder Age 65+	6.5	21.4	30
Married Couples	65.5	58.5	112
Households w/ Children	49.4	41.0	120
Two Workers	62.1	52.8	118
SESI	68	48	142
INCOME			
Income 0 to 25K	14.2	39.4	36
Income 25K+ to 50K	67.1	45.0	149
Income 50K+ to 75K	16.9	12.5	135
Income 75K+	1.8	3.1	58
Median HH Income	$29,920	$24,533	122
HOUSING			
Single Family Homes	78.7	81.2	97
Multi-Family Homes	21.3	18.8	113

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	35.3	35.0	101
Some College	23.0	14.6	158
College Graduate	22.5	14.1	160
Median # Years Comp.	12.9	12.2	106
AGE DISTRIBUTION			
Age 0 to 5 Years	6.2	4.1	151
Age 0 to 17 Years	19.2	15.5	124
Age 18 to 34 Years	35.9	27.4	131
Age 35 to 54 Years	17.2	13.0	132
Age 55 to 64 Years	6.6	8.8	75
Age 65+ Years	6.1	11.2	54
Median Age in Years	32.7	40.0	82
LENGTH OF RESIDENCE (In Years)	4.1	8.0	51

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	3,471,871	90,328,747	3.8
Adult Population	6,936,753	181,649,997	3.8

PRODUCT PREFERENCES

FINANCIAL SERVICES

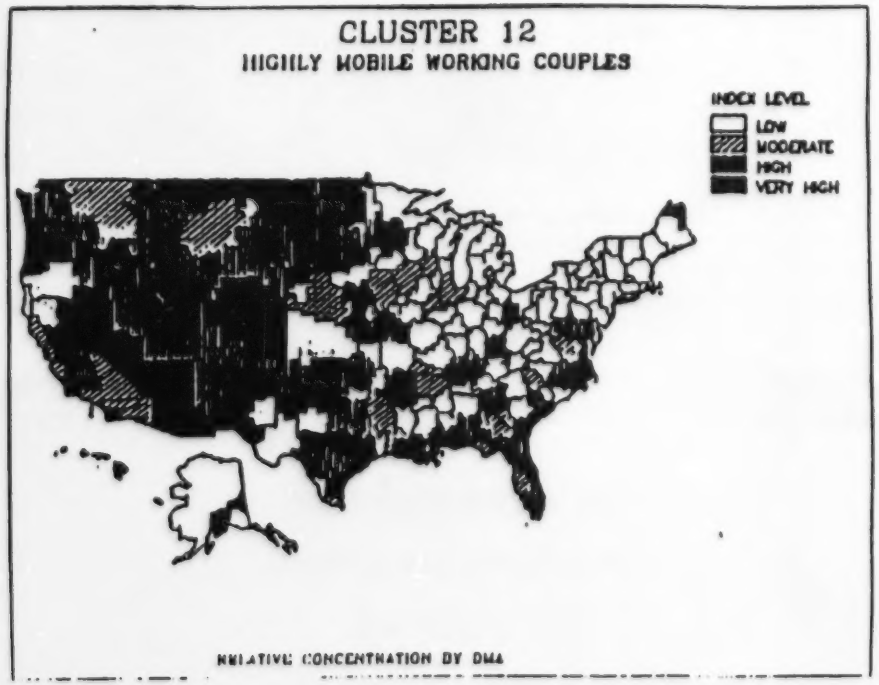
Common Stock
Investment Property
Line of Credit Account
Auto Loan - New Car
Higher Value Life Insurance
Travel/Entertainment Cards
Frequent Stock Transactions
Disability Insurance
Personal Loan (s) - Not for Education
Department Store Credit Cards

LEISURE PURSUITS

Racquet Ball
Golf
Domestic Travel
Tennis
Snow Skiing
Attend Pro Sports Events
Camping
Bicycling
Bowling
Public Issue Involvement

SPENDING HABITS

Imported Beers
Wine Coolers
Mexican Food Ingredients
Soft Drinks (Diet/Regular)
Imported Cars
Imported Wines
Jewelry
Clothing Expenditures
Merchandise by Mail/Phone



C JSTER 17

Young Urban Educated Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	33.5	19.9	168
White Collar	71.7	53.4	134
Blue Collar	15.4	30.9	50
Unskilled	2.3	5.0	46
HOUSEHOLD COMPOSITION			
Female Householder	33.0	24.3	136
Black Householder	5.7	10.5	54
Spanish Householder	3.7	4.7	79
Asian Householder	2.8	1.0	280
Householder Age 65+	8.5	21.4	40
Married Couples	29.3	58.5	50
Households w/ Children	17.1	41.0	42
Two Workers	59.8	52.8	113
SESI	68	48	142
INCOME			
Income 0 to 25K	41.5	39.4	105
Income 25K+ to 50K	51.9	45.0	115
Income 50K+ to 75K	5.9	12.5	47
Income 75K+	0.7	3.1	23
Median HH Income	$21,912	$24,533	89
HOUSING			
Single Family Homes	43.9	81.2	54
Multi-Family Homes	56.1	18.8	298

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	21.6	35.0	62
Some College	22.3	14.6	153
College Graduate	39.7	14.1	282
Median # Years Comp.	14.0	12.2	115
AGE DISTRIBUTION			
Age 0 to 5 Years	2.4	4.1	59
Age 0 to 17 Years	6.3	15.5	41
Age 18 to 34 Years	23.4	27.4	85
Age 35 to 54 Years	9.2	13.0	71
Age 55 to 64 Years	3.9	8.8	44
Age 65+ Years	4.6	11.2	41
Median Age in Years	27.9	40.0	70
LENGTH OF RESIDENCE (in Years)	2.5	8.0	31

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	2,312,714	90,328,747	2.6
Adult Population	4,014,659	181,649,997	2.2

CLUSTER 17

PRODUCT PREFERENCES

FINANCIAL SERVICES

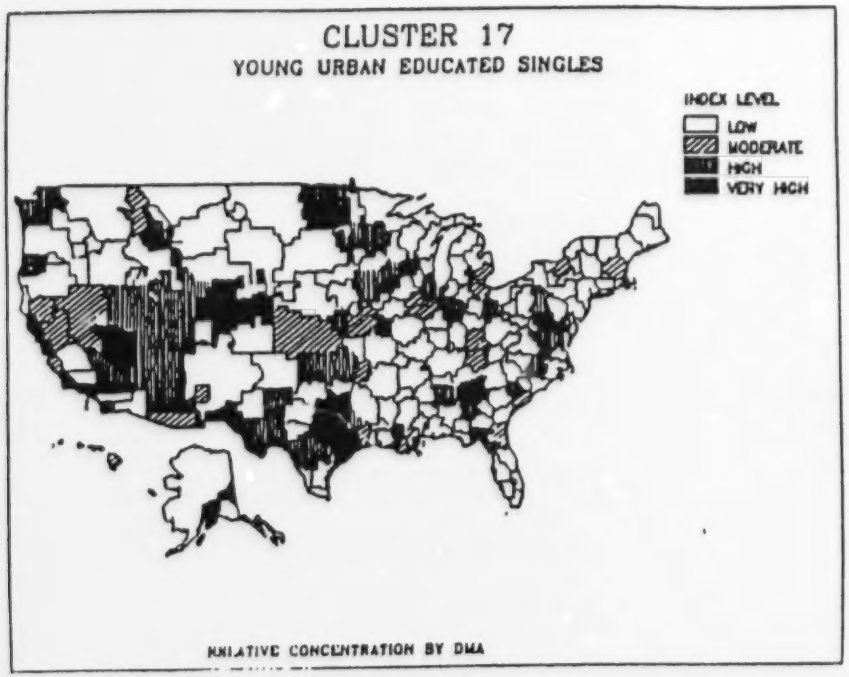
American Express Gold Card
Travelers Cheques
Visa Card
American Express Green Card
Temporary Insurance
Prepaid Health Program
Mutual Fund
Line of Credit Account
Non-Interest Bearing Checking Account

LEISURE PURSUITS

Snow Skiing
Water Skiing
Tennis
Racquet Ball
Frequent Foreign Travel
Jogging
Attend Movies Frequently
Live Theatre/Concerts
Prescribed Physical Fitness Programs
Camping
Bicycling

SPENDING HABITS

Imported Beers
Gourmet Ice Cream
Wine Coolers
Frozen Yogurt
Canned Soups - Single Serving
Diet Soft Drinks
Sports Equipment
Imported Cars
Clothing Expenditures



CLUSTER 24

Young Urban Ethnics

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	20.7	19.9	104
White Collar	56.1	53.4	105
Blue Collar	26.4	30.9	85
Unskilled	4.3	5.0	86
HOUSEHOLD COMPOSITION			
Female Householder	35.7	24.3	147
Black Householder	9.3	10.5	89
Spanish Householder	8.2	4.7	174
Asian Householder	3.8	1.0	380
Householder Age 65+	16.0	21.4	75
Married Couples	33.3	58.5	57
Households w/ Children	24.8	41.0	60
Two Workers	51.0	52.8	97
SESI	48	48	100
INCOME			
Income 0 to 25K	71.4	39.4	181
Income 25K+ to 50K	26.5	45.0	59
Income 50K+ to 75K	2.0	12.5	16
Income 75K+	0.1	3.1	3
Median HH Income	$17,328	$24,533	71
HOUSING			
Single Family Homes	43.6	81.2	54
Multi-Family Homes	56.4	18.8	300

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	31.9	35.0	91
Some College	19.5	14.6	133
College Graduate	16.8	14.1	119
Median # Years Comp.	12.3	12.2	101
AGE DISTRIBUTION			
Age 0 to 5 Years	2.9	4.1	70
Age 0 to 17 Years	8.0	15.5	52
Age 18 to 34 Years	20.6	27.4	75
Age 35 to 54 Years	8.4	13.0	65
Age 55 to 64 Years	4.6	8.8	52
Age 65+ Years	7.0	11.2	63
Median Age in Years	32.8	40.0	82
LENGTH OF RESIDENCE (In Years)	3.3	8.0	41

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,768,664	90,328,747	3.1
Adult Population	4,760,922	181,649,997	2.6

CLUSTER 24

PRODUCT PREFERENCES

FINANCIAL SERVICES

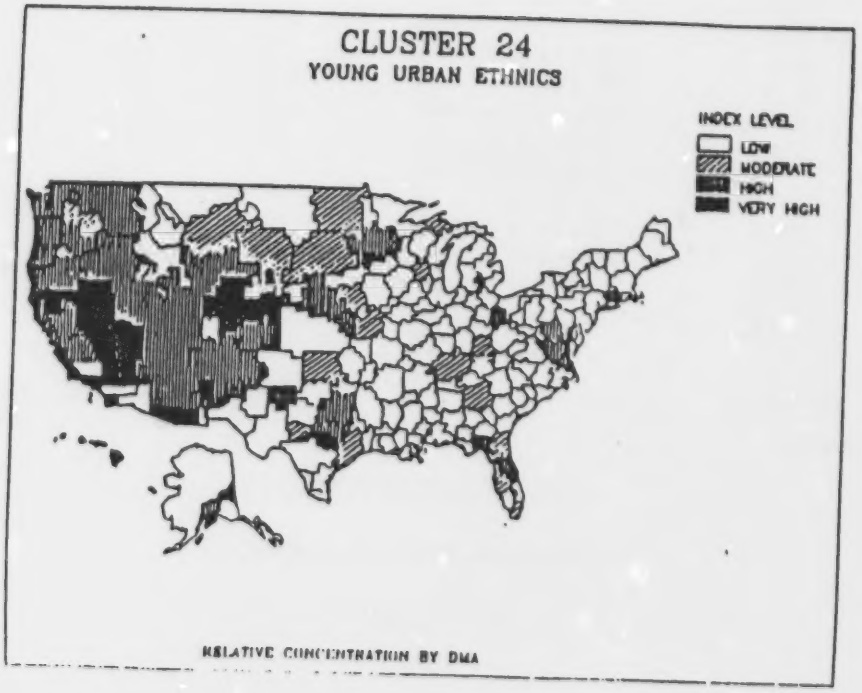
American Express Green Card
Temporary Insurance
Prepaid Health Program
Money Orders
Vision Care Insurance
Travelers Cheques

LEISURE PURSUITS

Snow Skiing
Attend Pro Sports Events
Travel to Mexico
Camping
Jogging
Attend Movies
Water Skiing
Racquet Ball
Bowling
Live Theatre/Concerts

SPENDING HABITS

Gourmet Ice Cream
Imported Beers
Health & Beauty Aids
Stereo Equipment
Records/Tapes
Frozen Yogurt
Wine Coolers
Gourmet Food Items



CLUSTER 25

Young Mobile Apartment Dwellers

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	17.6	19.9	88
White Collar	49.2	53.4	92
Blue Collar	33.5	30.9	108
Unskilled	5.0	5.0	100
HOUSEHOLD COMPOSITION			
Female Householder	29.2	24.3	120
Black Householder	4.4	10.5	42
Spanish Householder	3.7	4.7	79
Asian Householder	1.0	1.0	100
Householder Age 65+	20.4	21.4	95
Married Couples	50.4	58.5	86
Households w/ Children	32.3	41.0	79
Two Workers	52.7	52.8	100
SESI	45	48	94
INCOME			
Income 0 to 25K	58.7	39.4	149
Income 25K+ to 50K	37.5	45.0	83
Income 50K+ to 75K	3.6	12.5	29
Income 75K+	0.2	3.1	6
Median HH Income	$20,411	$24,533	83
HOUSING			
Single Family Homes	21.5	81.2	26
Multi-Family Homes	78.5	18.8	418

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	36.0	35.0	102
Some College	16.2	14.6	111
College Graduate	11.7	14.1	83
Median # Years Comp.	12.0	12.2	98
AGE DISTRIBUTION			
Age 0 to 5 Years	4.5	4.1	110
Age 0 to 17 Years	14.9	15.5	96
Age 18 to 34 Years	27.9	27.4	102
Age 35 to 54 Years	12.5	13.0	96
Age 55 to 64 Years	8.5	8.8	97
Age 65+ Years	12.9	11.2	115
Median Age in Years	37.0	40.0	93
LENGTH OF RESIDENCE (in Years)	6.1	8.0	76

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,494,365	90,328,747	2.8
Adult Population	4,643,898	181,649,997	2.6

CLUSTER

PRODUCT PREFERENCES

FINANCIAL SERVICES

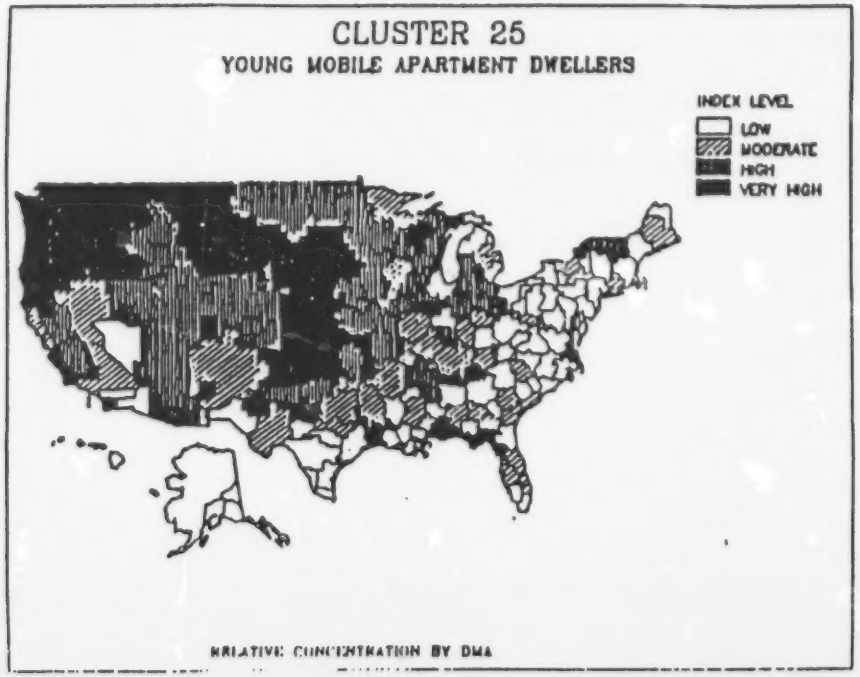
Medical/Healthcare Insurance - Medicare
Money Orders
Non-Interest Bearing Checking Accounts
Home Improvement Loans
Legal Services

LEISURE PURSUITS

Camping
Snow Skiing
Belong to Fraternal Order
Water Skiing
Fishing
Hunting
Public Issue Involvement

SPENDING HABITS

Health & Beauty Aids
Non Filter Cigarettes
Weight Watchers Products
Soft Drinks
Domestic Beers
Snack Candy
Clothing Expenditures
Imported Trucks



QUESTIONNAIRE

TOURISM - MARKET MATCH STUDY - #448

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY QUESTIONNAIRE

Hello, this is _____, calling from Gilmore Research, a national survey research company. We are conducting a survey (today/this evening) and your household has been selected.

We are interviewing people who have travelled outside the United States during the past three years or who plan to do so in the next two years. Is there anyone like that living in your household, who is also 25 years old or older?

NOTE: TRAVEL FOR BUSINESS OR PLEASURE IS ACCEPTABLE

IF NO, RECORD AND TERMINATE

IF YES, CONTINUE

Is there more than one person like that living in your household?

IF NO, ASK TO SPEAK TO THE PERSON WHO HAS OR IS PLANNING TO TRAVEL OUTSIDE THE US
CONTINUE AT "A"

IF YES, SAY:

Of those who have travelled outside the United States, I need to speak to [RANDOM: oldest/youngest] May I please speak to that person?

IF YES, CONTINUE AT "A"

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

A. REINTRODUCE IF SELECTED R IS NOT PERSON WHO ANSWERED THE PHONE

My questions will take 10 or 12 minutes, May I go ahead? Thank you.

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

PERSUADERS

We are not selling anything at all.

The topic of the interview is international travel; what you like to do and where you like to go.

It is very important that we speak to you. Your opinions represent many others and if we cannot interview every member of our sample, the accuracy of our data will be reduced.

This is a very important study, because it will be used to plan tourist activities.

I can't tell you who the sponsor of the study is right now, because it might influence the way you answer some questions. But I would be happy to tell you at the end of the interview.

Everything you say will be kept strictly confidential.

Q1. Have you taken a trip outside the United States, either for business or pleasure, during the past three years, or are you planning such a trip during the next two years?

1. YES | SKIP TO Q3

2. NO
3. DON'T KNOW
4. REFUSED

Q2. ASK IF Q1 EQ 2, 3 OR 4. Is there anyone else in your household, who is 25 or older, who has travelled outside the US during the past three years or is planning to do so during the next three years?

1. YES - ASK TO SPEAK TO THAT PERSON AND X-BACK TO A.

2. NO | SAY: I only need to talk to people
3. DON'T KNOW | who have or are planning to travel
4. REFUSED | outside the US, so those will be
| all my questions. Thank you for
| your time. TERMINATE AND X-BACK

Q3. Thinking of your major vacation travel to any location, what vacation destinations have you traveled to in the last three years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4. And what destinations do you have <u>firm</u> plans to visit during the next two years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4B. Have your travel plans changed in response to the war in the Persion Gulf?

1. YES
2. NO
3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q4C. ASK IF Q4B EQ 1. How have your travel plans changed?

1. POSTPONED/CANCELLED TRIP TO MIDEAST
2. POSTPONED/CANCELLED TRIP TO EUROPE
3. POSTPONED/CANCELLED OTHER TRIP OUTSIDE THE US/WILL TRAVEL ONLY IN THE US
4. POSTPONED/CANCELLED AIR TRAVEL/WILL NOT TRAVEL BY AIR
5. OTHER (SPECIFY - ONE FRAME)
6. DON'T KNOW
7. REFUSED

Next, I'd like you to think about a vacation you might take outside your home state. I'm going to read four general types of vacation you might take. Please rate each one on a scale of 1 to 5, where 1 means you would not be interested at all in that type of vacation, and 5 means you would be extremely interested.

First is:

RANDOM

Q5. A city trip, where you could shop, visit museums, enjoy entertainment, dine, attend plays or concerts or just stroll and enjoy the city. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q6. An outdoor adventure vacation in a natural area, where you could engage in activities such as camping, hunting, fishing, hiking or rafting. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE I SKIP TO Q43

Q7. A resort vacation to a resort or a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis, horseback riding and so on, were available close by or on the premises. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NOT TRAVEL OUTSIDE HOME STATE I SKIP TO Q43

Q8. A touring vacation by car, bus, RV or train through areas of scenic beauty, cultural or general interest. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE I SKIP TO Q43

*** DISPLAY SCREEN OF RESPONSES TO Q5-8.
*** INTERVIEWER: SELECT VACATION TYPE WHICH IS HIGHEST RATED, GIVEN QUOTAS

Next, I'd like to ask you some questions about a [RECOVER FROM DISPLAY SCREEN THE TYPE OF VACATION R FINDS MOST INTERESTING]. Remember that this is a vacation that you would take outside your home state.

Q10. How much per day would you be willing to pay for a [RECOVER VACATION TYPE FROM DISPLAY SCREEN], per person, excluding transportation costs?
FOR TOURING VACATION, DELETE "excluding transportation costs"

_____ DOLLARS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just take a guess?)
9999. REFUSED

Q11. Assuming that this vacation took outside the your home state, what is the maximum hours you would be willing to travel get to your destination?

____ HOURS (IF RANGE GIVEN, ENTER THE AVERAGE)

9996. NONE
9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q11B. ASK IF Q11 NE 9996, 9997, 9998,9999. Does this refer to travel by air or by car?

1. AIR
2. CAR
3. OTHER
4. DON'T KNOW
5. REFUSED

Q12. What would be the best length of vacation, in terms of number of nights away from home? Assume that this is your major vacation during the year.

____ NIGHTS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q13. What degree of luxury would you want for this vacation:

1. The most luxurious,
2. First class,
3. Middle range, or
4. Basic accommodation?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q14. If this were your major vacation during the year, how many people would there be in your travelling party, including yourself?

____ NUMBER (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just make an estimate?
9999. REFUSED

Next, I'm going to read a list of activities that you might do on a [RECOVER TYPE OF VACATION FROM DISPLAY FRAME]. Using the scale from 1 to 5, please tell me how interested you would be in each one.

(Remember that 1 means that you are not at all interested and 5 means that you are extremely interested.)

*** FOR CITY VACATIONS

RANDOM

Q15. Shopping (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q16. Sightseeing (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q17. Visiting heritage or historic sites. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q18. Cultural activities, like museums, theatre or opera. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q19. Special events or shows. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q20. Visiting gardens. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q21. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR TOURING VACATIONS

RANDOM

Q22. Guided or organized tours. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q23. Tours which stay mainly in cities. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q24. Tours which stay mainly in rural areas. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q25. Tours involving sports activities, like golf, tennis or fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q26. Tours involving outdoor activities, like hiking or nature walks. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q27. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR RESORT VACATIONS

RANDOM

Q28. Marine resorts (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q29. Fishing resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q30. Ski resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q31. Golf resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q32. Guest or dude ranches ranches. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q33. Health resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q34. Wilderness resorts which are not acccessible by automobile. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q35. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR OUTDOOR VACATIONS

RANDOM

Q36. Wildlife viewing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q37. Coastal cruising or boating. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q38. Hiking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q39. Whitewater canoeing or kayaking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q40. River rafting. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q41. Fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q42. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

Q42B. Would you prefer a vacation with guided activities, or without a guide?

1. GUIDED
2. SOME OF EACH/DEPENDS
3. UNGUIDED

4. OTHER
5. DON'T KNOW
6. REFUSED

Q43. Next, thinking of the [RECOVER VACATION TYPE FROM DISPLAY FRAME OR IF NO VACATION TYPE IS PREFERRED, SAY: your next major vacation], what are the three most attractive destinations that come to mind which are outside your home state?

ONE FRAME

Q43A. Have you ever heard the slogan "Super Natural" associated with a vacation destination?

1. YES
2. YES WITH MENTION OF BRITISH COLUMBIA
3. NO
4. OTHER
5. DON'T KNOW/NOT SURE/DON'T REMEMBER
6. REFUSED

Q43B. ASK IF Q43A EQ 1, 3-6. Have your ever heard this slogan (Super Natural) associated with British Columbia?

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q44. How much do you know about British Columbia as a destination for <u>any type</u> of vacation?

READ

1. A great deal,
2. A moderate amount,
3. A little, or
4. Nothing at all?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q45. How many times, if any, have you taken <u>any kind</u> of vacation in <u>British Columbia</u> for one night or longer?

____ NUMBER OF TIMES

9998. DON'T KNOW (ASK: What would be the approximate number of times?)

9999. REFUSED

Q46. On the scale of 1 to 5 (where 1 means not at all interested and 5 means extremely interested), how interested are you in taking a vacation <u>of any kind</u>, lasting one night or longer, in British Columbia?

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW | SKIP
7. REFUSED | TO Q48

Q47. ASK IF Q 46 EQ 1-5. Why did you rate your interest in a British Columbia vacation at a [RECOVER SCORE FROM Q47]? PROBE AND CLARIFY

THREE FRAMES

Q47B. Has Canada become a more attractive destination to you, in the light of the war in the Persian Gulf, or not?

1. HAS BECOME MORE ATTRACTIVE
2. HAS NOT BECOME MORE ATTRACTIVE

3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q47C. ASK IF Q47B EQ 1 OR 2. What are your major reasons for saying that?

THREE FRAMES

Now for a different type of question. During the past year, please tell me if you have seen or heard any advertising for each of the following places as a vacation destination.

RANDOM

Q48. Hawaii. (Have you seen or heard any advertising for Hawaii as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q49. Australia. (Have you seen or heard any advertising for Australia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q50. Alaska. (Have you seen or heard any advertising for Alaska as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q51. Canada. (Have you seen or heard any advertising for Canada as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q52. British Columbia. (Have you seen or heard any advertising for British Columbia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q53. Alberta. (Have you seen or heard any advertising for Alberta as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q54. Ontario. (Have you seen or heard any advertising for Ontario as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q55. Colorado. (Have you seen or heard any advertising for Colorado as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

END RANDOM

On a scale of 1 to 5, how useful do you find each of the following as a source of information when you are planning a vacation, where 1 means not at all useful and 5 means extremely useful?

RANDOM

Q58. Brochures.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q59. Radio and television advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q60. Newspaper and magazine articles and advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q62. Travel agents or tour operators.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q63. Friends or relatives.
(How useful do you find this source of information , on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

END RANDOM

Q64. Finally, just a few questions about yourself to help us classify our data. First, who makes the major travel decisions in your household:

1. The male head of household,
2. The female head of household,
3. Both together, or
4. Someone else?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q65. Into which age category may I place you?

1. Under 25,
2. 25 to 34,
3. 35 to 44,
4. 45 to 54,
5. 55 to 64, or
6. 65 and over.

Q66. What is your full nine-digit zip code?

IF R DOES NOT KNOW ALL NINE DIGITS, CODE FIRST FIVE DIGITS TO THE LEFT OF THE DASH.

_ _ _ _ _ - _ _ _ _ ENTER CODE

99998. DON'T KNOW
99999. REFUSED

Q67. ASK ONLY IF R DID NOT SUPPLY FULL NINE-DIGIT ZIP CODE:
And what is your street address?

ONE FRAME

NOTE: PLEASE BE CAREFUL. SPELLING IS EXTREMELY IMPORTANT. ALSO, BE SURE TO RECORD THINGS LIKE "WEST" OR "NE" AND TO GET A HOUSE NUMBER, ROUNDED TO THE NEAREST HUNDRED IF NECESSARY. DO NOT ACCEPT INTERSECTIONS UNLESS YOU CANNOT GET A HOUSE NUMBER

Q68. So that my supervisor can verify my work, may I have your first name or initial?

ONE FRAME

Those are all my questions. Thank you very much for your time.

Q69. RECORD GENDER

1. MALE
2. FEMALE

Q70. RECORD LENGTH OF INTERVIEW

Q71. RECORD CITY

1. SEATTLE
2. PORTLAND
3. SAN FRANCISCO
4. LOS ANGELES
5. DALLAS
6. CHICAGO

Q72. RECORD DATE

Q73. RECORD PHONE NUMBER

Q74. INTERVIEWER ID